

CFS Edge

The New Possible

Introducing CFS Edge, the game changer you've been waiting for. Global leading technology, built with local expertise, CFS Edge is the ultimate advice integration solution designed to keep you at the frontier of advice.

Colonial
First State



Get the edge in Integration

Seamless, secure integration with leading advice technology providers lets you set up new clients in seconds, eliminating the risk of error and improving the experience for you and your clients.

Our range of partners will continue to expand, as your favourite fintechs will have access to our open access portal to build integration links with CFS Edge.

Get the edge in Intelligence

Incorporate pre-built, actionable insights to your unique dashboard to compare yourself to other platform users and identify opportunities for your business.

Harness a new level of ESG intelligence to help clients invest according to what matters most to them and engage them with ESG impact reporting based on their preferences.



Get the edge in Opportunity

Access our full suite of managed accounts and unrivalled investment capability to create solutions tailored to your clients.

Advanced modelling tools let you assess portfolios from new perspectives.

Get the edge in Control

Tailor your experience, including your dashboard, how portfolio information is presented, and the frequency and format of platform notifications.

Customise your clients' experience to suit your relationship and their appetite for online access.



Get the edge in Service

Keep track, prioritise, and plan like never before with a workflow tracker which gives you visibility of in-progress tasks.

Interactive learning and in-platform support helps you to quickly answer questions as you work.

And the engaging digital experience, backed by Colonial First State's award-winning service, gives you the confidence to focus on your clients and your practice's growth.

Colonial First State

Colonial First State (CFS) has been helping Australians with their superannuation, investment, and retirement needs since 1988. CFS currently manages or administers circa \$151 billion globally.

Our majority shareholder Kohlberg Kravis Roberts & Co (KKR) is investing more than \$430 million into CFS over five years, focussing on modernising all core technology systems to deliver market-leading services, improving digital channels, expanding products and services, and making CFS easier and more efficient to do business with.

Our vision

When we set out to create a new solution, we looked at other platforms and the technology that underpins them, and recognised that we needed something different.

We wanted a modern, integrated solution with next generation digital and data capabilities, to help practices remove complexity and friction and increase their business capacity, setting them up for growth.

CFS and FNZ partnership

Global leaders with proven tech capability, FNZ is trusted by more than 650 major financial institutions, and has over \$2.2 trillion in assets under administration, representing the combined savings and investments of over 20 million customers. Our ongoing partnership will ensure CFS Edge continues to benefit from global expertise, ongoing R&D, and the unparalleled pace of innovation that comes from global scale.

Built with advisers

In collaboration with advisers, we've delved deep to understand the opportunities across diverse practices, so we can provide you with an advice solution that helps unlock greater potential in your business.

Data security

Built on state-of-the-art technology, CFS Edge is protected by industry-leading cyber security standards 24/7.

Multi-factor authentication is a key security feature to access CFS Edge. All sensitive data is stored and transmitted in an encrypted format.

To find out more

To learn more about CFS Edge, contact your local Business Development Manager or visit cfs.com.au/cfsedge

Advisor use only

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